Customer Contact Center

New Hire Onboarding Plan

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The South Carolina Public Employee Benefit Authority (PEBA) was created July 1, 2012 by the South Carolina General Assembly as a part of Act No. 278. PEBA is a state agency responsible for the administration and management of the state’s employee insurance programs and retirement systems. PEBA’s mission is to provide competitive retirement and insurance benefit programs for South Carolina public employers, employees and retirees. Our vision is serving those who serve South Carolina.

PEBA’s Customer Contact Center has the highest turnover rate within the agency. Most of the turnover is what we consider “good” turnover because our counselors are well-versed in retirement and insurance benefits and therefore very marketable when it comes to filling roles in other positions within the agency. I joined the management team of the Customer Contact Center in March of 2016 and have gone through numerous hiring events.

Currently, the Customer Contact Center has no written/structured new hire plan that focuses on every task that needs to be completed in order to help get a new hire acclimated and settled within our department. Supervisors are informally assigned different tasks during our management meeting once new hire selections are made. We generally notate our assigned tasks and end up thinking of other required tasks that need to be completed after the meeting. When other tasks surface, supervisors work to complete those tasks, and at times efforts are duplicated because there was no formalized plan from the beginning. We generally have to have touch points to ensure all bases are covered.

One of my most memorable experiences was a new hire arriving at their cubicle with two monitors and no computer. We clearly dropped the ball and I was so embarrassed. I vividly remember all the planning and preparing that went into making sure everything was ready for this new hire.

One of our agency's strategic goals is to enhance the customer experience for members and employers. In order to enhance their experience, we must have seasoned, knowledgeable counselors in place to answer their questions and assist them with all their retirement and insurance benefits needs. As a result, retention is crucial for producing seasoned, knowledgeable counselors. Abby Baumann notes in her article "Organizations with a standard onboarding process experience 54 percent greater new hire productivity, along with 50 percent greater new hire retention." An onboarding plan sets the tone on how the rest of the organization's processes are functioning ultimately resulting in how a candidate will expect to be treated as a part of the organization.

The Customer Contact Center is comprised of one manager, Jeremy Cannon, and 5 supervisors who manage different subsets of benefits. I, along with Larissa Raven, manage 20 Member Support – Retirement Benefit Counselors. Roderick Chambers and Justin Waites manage 12 Member Support – Insurance Benefit Counselors. Rachel Mabry manages 7 Employer Support Unit Retirement and Insurance Benefit Managers.

I surveyed the contact center supervisors in order to assess their role with their direct reports (See **Appendix 1**). I also surveyed the contact center staff for feedback on their new hire experiences (See **Appendix 2**). I used Survey Monkey because the anonymity of surveys allow respondents the freedom to answer more candidly.

Turnover is expensive and exhausting. Our training program is structured, covers 10 different modules, and spans for about a 3 – 4 month period. It typically takes as much as 1 – 2 years for a new hire in the contact center to become completely productive as a Benefit Counselor! As a result, retention is a crucial component in producing seasoned Benefit Counselors. My hope is to increase productivity and our retention rate with a well-planned and well-executed onboarding process. Bill Cleary states "An effective new-hire experience can contribute to an employee's productivity and create value for the organization. Studies show that effective onboarding can improve retention rates by 52 percent, time to productivity by 60 percent, and overall customer satisfaction by 53 percent."

Fourteen out of thirty-six (only about 40 percent) contact center employees responded to the survey which was very surprising! The timing on the release of the survey was good because we were right in the midst of our non-peak season. Our call volume and wait times are extremely low. I had high hopes that I would get a response from far more than 50 percent of the team. I also purposely chose close-ended questions that are easily answered to entice the taker to complete the survey. Ultimately, I feel the non-responsiveness was due in part to the lack of organizational trust and culture. I have always had reservations about completing surveys and completely believing that my response(s) would be anonymous.

Out of those who responded, more than 50 percent said their onboarding experience in the contact center was great! Our agency, through our Human Resources (HR) Department, has a formal onboarding process in place so I must note and attribute some of the positive feedback from those who may have misread the question, reflected on our agency's onboarding, and focused on HR's process in response to this survey. Most agreed that their experience could have been improved with new hire team meetings and weekly one-on-one supervisor meetings (during the first month of employment).

Compensation, "other" reasons, and the amount of information a rep is required to retain appeared to be what most reps least liked about their jobs. What's really interesting is for those who responded to this question implying that there are "other" reasons opted not to elaborate with specific details! In the body of my email I clearly stated what I hoped to accomplish for the contact center – "The goal of an onboarding process is to provide structure, consistent work flow process, improve the team environment, and further enhance job satisfaction. This cannot be achieved without your input." – and ended with a statement letting them know just how important their feedback is to these efforts.

The contact center is the primary contact for all telephone inquiries for the agency. In addition to answering calls, we assist members and subscribers via Live Chat and Internet Email. We have five queues – two insurance (Employer Support and Subscriber) and three retirement (Employer Support, Member Support and Tier 1). Last month, we answered 27,249 calls! Benefit Counselors in the contact center are required to learn, retain, and maintain resources for a lot of information. Counselors must be able to correctly interpret, apply and explain state policies, procedures, regulations and statutes to callers with various social and educational backgrounds in layman's terms. Unlike other department reps, benefit counselors are required to master *all* of the areas that make up retirement and/or insurance benefits!

Retirement benefit questions encompasses the following: Employer Participation, Membership and Enrollment, Member Access, Reporting and Service Credit, Service Purchase, Refunds and Required Minimum Distributions, Retirement Annuities, Disability Retirement, and Death Benefits. Insurance benefit questions include, but are not limited to General Information, Health Insurance, Prescription Benefits, Dental Insurance, Vision Care, Life Insurance, Long Term Disability, MoneyPlus, and Retiree Group Insurance. When a member or subscriber phones PEBA, most times their need encompasses two or more different types of subject areas.

A counselor's ability to multi-task, explain complex processes and procedures, and think analytically are essential. The position also requires self-motivation, patience, professionalism, and good verbal communication skills. The starting salary for a Benefits Counselor I is $34,000, so I can understand why compensation and the amount of information a rep is required to learn is what most respondents liked least about their jobs. I would like to see the base salary at $40,000 which is comparable to the demands of the position.

Team environment and customer interaction were the top most pleasing key factors for working in the contact center. Team environments boost productivity, provide innovation and improve morale! Approximately 14 percent of the responders cited that there were other reasons for what they most liked about the contact center. Compensation did not make the list of what individuals liked most about their job.

Over 40 percent of responders feel valued in their position and more than 85 percent felt properly welcomed as a new hire! We frequently meet with our team members on a monthly bases for coaching sessions. During these sessions, we share statistical measurements on what we call key performance indicators for three categories – handled calls, calls per hour, and availability percentage. We also highlight successes and improvement. We share quality call monitoring results and provide a summary of personnel data (i.e. attendance, leave, etc.). An overwhelming 90 percent of responders said that they understand how their performance is measured and evaluated which is a great testament to the value of our monthly coaching sessions.

Our training program is rigorous and we devote a lot of time and money towards these efforts to ensure staff is fully prepared to perform. Over 90 percent of the responders agreed that they have the tools needed to do their job well and would recommend working in the contact center to others! We strive to create an environment where people enjoy coming to work.

Most of the supervisors (60 percent) have what they would call a formal individual plan in place for their new team members and 80 percent feel their existing plan is sufficient, while 20 percent simply don't have a plan at all. An organized plan allows for the implementation of policies and procedures; without it, an organization has no guide. Therefore, I believe that a Customer Contact Center New Hire Plan would help us maximize resources, increase efficiency, and ultimately allow us more opportunity to effectively achieve goals.

All managers currently meet with new hires one-on-one within the first week of their start date. The purpose of our first meeting is to ensure immediate administrative needs are met, communicate job expectations, and get the employee acquainted with the agency. This meeting is crucial as a starting point in the development of an open two-way communication with new employees to address and answer questions.

A formal plan would ensure that all our efforts are aligned and consistent. As new employees build relationships with existing employees, they usually share the details of their individual onboarding experiences. When these experiences are like night and day, it creates a very uneasy feeling about the credibility of the department and/or agency.

Eighty percent of the supervisors feel that a personalized welcome packet could serve as an asset in providing new team members with a warm welcome and 20 percent felt no additional action is needed. We currently have a Customer Contact Center (CCC) Handbook that covers details related to attendance, instructions for using our web-based phone system – Cisco Finesse, cell phone usage, celebrations, emergency situations, etc. One of the supervisors, Larissa Raven, came to me after completing the survey to suggest that we update and revamp our current handbook and convert it into an employee welcome packet.

I thought her idea was great and we will start work towards these efforts soon. I envision the first page to be a welcome letter on agency letterhead from the Customer Contact Center Manager. In John Boitnott's article he encourages companies to take note from companies like Google, Facebook, and IBM who have "blazed new trails in employee onboarding" assuring us that "the return on investment in a competitive on-boarding process makes forking out the cash on a quality welcome package worth it. And it's not necessarily a one-time thing; it's been reported that companies have better long-term success when their welcome packages are structured over a period of time."

When asked how they would measure the effectiveness of their new hire process, most supervisors said their process is good and 40 percent said the plan is sufficient. No one responded by describing their process as excellent which is a clear indicator that there is room for improvement and I believe we can move the bar from good to great. A structured plan ensures check-points for a seamless process. All the supervisors said they follow the same onboarding execution plan for each new hire. Unfortunately, when everyone consistently follows "his/her" execution plan; we as contact center management are still viewed as unorganized because "our" plan does not exist. All the supervisors feel there is a need for a formal onboarding plan.

After brainstorming, organizing, and categorizing all the tasks involved in our new hire process, I developed an action list (See **Appendix 3**) and circulated the list via email to the contact center management team for review and feedback on any missed tasks. I met with our Technical Support Manager, Alvin Carpenter, to review their requirements related to Form 8416 and get feedback on any missed items and/or notations for system access.

Once I receive all the feedback from our management team, I will update the action list accordingly. I plan to use the action list during our next new hire event as a “test run” which is planned for mid-March. I plan to follow (and ask each supervisor to do the same) the flow on the action list to ensure all bases are covered and there are no missing tasks. This additional step gives me the most assurance as most times additional details surface when you are in the actual performance of job duties.

I met with Rebekah Guzzi, Organizational Research and Development, to share my idea for the action list and to get suggestions on the type of form that would best suit our needs. She suggested using the JIRA system for versatility. JIRA would also give us the capability to track process as a means of an audit trail. Rebekah suggested I meet with our Information Technology (IT) developers to share my vision of exactly what I want the electronic action list form to do for us so they can develop the end product. There would be no cost involved as we already own the product – The JIRA system. As far as a timeline, Rebekah advised that it would entail a couple of planning sessions during which I would provide the workflow steps and the fields for information.

The main obstacle will be waiting on IT’s priority list as they are currently amid other time sensitive projects that would take precedence over my request. In the meantime, the contact center management team plans to use our greatest resource – my version of the action list during hiring events.

The stakeholders are the contact center management team who will utilize the action list during new hire events. Once the project is complete, we will update the list as new tasks surface and use this tool during every new hire event. I already have buy-in from the contact center's management team for a more organized plan.

An organized plan provides a starting point for management to evaluate whether we are successful in our efforts. As we incorporate the action plan into our workflow, updates and/or discrepancies should be noted and corrected. Additionally, we will review the plan at the beginning of each new hire event to ensure updates have been incorporated. All tasks should be completed within 30 days of the start date and we will access after each hiring event.

I plan to do check-ins with new hires individually and gather feedback on their impressions as they navigate through the onboarding process, as well as conduct a survey at the end of their 30 days. These measures will serve to evaluate what we are doing well and identify areas of improvement. Ultimately, I want our onboarding process to be as effective and efficient as possible.

The implementation of this project leads to the best utilization of resources, streamlines processes, improves quality, and thus strengthens our team and agency. The real value added will be once the contact center's new hire plan is perfected, we will share our approach with Human Resources so it can be adopted and used by the entire agency. In summary, an organized plan creates an atmosphere of order and discipline in an organization. Employees know in advance the expectations and therefore conformity can easily be achieved.

Bibliography

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Appendix 1: Supervisor Survey

SC PEBA Customer Contact Center's Onboarding (Supervisors)

As a part of my Certified Public Manager (CPM) Program project, I am exploring ways to implement a customer contact center onboarding plan. When answering the following questions, think solely from the perspective of *<u>your</u> role with your direct reports*.

Please complete the following survey by *Thursday, February 7, 2019*. Your feedback is anonymous and greatly appreciated.

Thank you!

1. Do <u>you</u> have a formal onboarding plan?

- Yes
- No

2. How would you best describe <u>your</u> existing plan?

- Non-existent (you do not have one)
- Chaotic (all over the place)
- Sufficient
- Excellent

3. Do you meet with your new hire one-on-one, within the first week of their start date?

- Yes
- No

4. Which of the following could be incorporated in order to provide your new team member with a warm welcome?

- Nothing
- More face time
- A personalized welcome packet

5. How would you measure the effectiveness of <u>your</u> new hire process?

- Sufficient
- Good
- Excellent

6. Is <u>your</u> onboarding execution consistent (Do you follow the same process for each new hire?)?

○ Yes

○ No

7. Please describe your personal experience as a new hire and give a few examples of good and poor onboarding practices you encountered. What have you learned from these experiences?

8. Do you believe that there is a need for a formal onboarding plan within our department?

○ Yes

○ No

9. Please use this space to share any additional feedback you feel would be beneficial to our department.

Appendix 2: Staff Survey

SC PEBA Customer Contact Center's Onboarding (Staff)

As a part of my Certified Public Manager (CPM) Program project, I am exploring ways to implement a customer contact center onboarding plan. It is my hope that by garnering your responses, a plan will be generated for review, consideration, and ultimately implementation. The goal of an onboarding process is to provide structure, consistent work flow process, improve the team environment, and further enhance job satisfaction. This cannot be achieved without your input.

Please complete the following survey by *Thursday, February 7, 2019*.

Your feedback is greatly appreciated and completely anonymous.

Thank you.

1. How would you describe your onboarding experience within the Customer Contact Center?

- Good
- Great
- Chaotic
- Helpful
- Non-existent

Comments:

2. Which of the following would have improved your onboarding experience?

- New hire team meeting(s)
- Weekly one-on-one supervisor meetings (first month of employment)
- Nothing
- Other (please elaborate)

3. What do you like least about your job?

- Compensation
- The amount of information that you are expected to learn and retain.
- The timeframe for which you are expected to learn the information.
- Structured environment
- Other (please elaborate)

4. What do you enjoy most about your job?

- Customer Interaction
- Team Environment
- Compensation
- Structured Environment
- Other (please specify)

5. Do you feel valued in your position?

	Strongly disagree	Disagree	Neutral	Agree
Do you feel valued in your position?				

Comments

6. Did you feel properly welcomed as a new hire?

- Yes
- No

Comments:

7. I understand how my performance is measured or evaluated.

- Yes
- No

Comments:

8. I have the tools needed to do my job well.

- Yes
- No

Comments:

9. Would you recommend working in the contact center to someone else?

- Yes
- No

Comments:

10. Please provide any additional information for which you believe will be beneficial.

Appendix 3: Customer Contact Center New Hire Action Plan

Customer Contact Center

New Hire Action List

- ❑ Phone Screening
- ❑ Interview panelist packets
- ❑ Interviews
- ❑ Meeting of the minds
    - Supervisor’s interview notes comparison, discussion, and candidate selection(s)
- ❑ Reference Checks
- ❑ Job offer
- ❑ Inform IT of hiring event
    - How many headsets do we have on hand?
    - Do we need to order?
    - Consider 1 ear or 2 ear? How many of each type?
- ❑ Inform Paulette (Give names for creation of cubicle name label)
- ❑ Personal call from supervisor to your direct report(s)
    - Introduce yourself
    - Thank you for accepting our offer
    - Inform new hire that they will be on your team/your direct report
    - First day arrival time
    - Where to park
    - Will meet you at the front door
    - What you can expect on your first day
    - Give your direct line number
        - Encourage them to save to their contacts
- ❑ Email to call center team to inform of new hire(s) name(s) and start date
- ❑ Form 8416 Computer Resources Access Request
    - Complete and submit to IT at least 2 – 3 days prior start date
    - You do not need new hire’s signature
        - Request access to – Retirement Counselor:
            - UNIX – Test and Production
            - CRIS – Test and Production
            - CSCC Contact Log Reasons and Contact Log Maintenance
            - Member Access – Test
            - Imaging – Retirement IA Folder
            - CS Inbox and Email/Print from Imaging
            - Call Center Calendar
            - Assign a phone number and fax number
    - Ensure workspace set up
        - Clean
        - Stocked with supplies (notepads, pens, headset, etc.)
        - Desk keys
        - Make sure it’s equipped with a computer, monitors, and phone

        - Welcome packet (formerly CCC Handbook)

- [ ] Inform security staff (BPS officer) of new hire name(s) and start date
    - Provide instructions/directions (of your intent to meet at front door, and provide an "if not" plan of action – i.e. existing employee lets new hire in building as they arrive early)

- [ ] First day
    - Meet/Greet new employee(s) at front door
    - Escort to workspace (may have personal belonging/personal desk supplies that need to be put away)
    - Show location of restrooms
    - Escort to HR meeting place for agency onboarding
    - Introduce to team members
- [ ] 1st meeting with new hire
    - Assign a peer mentor
        - Location and how to use copier
        - How to send/receive a fax
        - Location of electronic hole puncher
        - Location of coffee station
        - How to log into Cisco Finesse
        - SCEIS – how to enter your working time and leave request(s)
        - Print and give PEBA's internal phone list
            - Show how to access electronically
        - Review Customer Services Intranet
        - Location of Contact Center Calendar
    - Position Description and EPMS review (once personnel number appears in SCEIS)
        - Review job duties and expectations
    - Call in Procedures Memo
    - Make sure they have supervisors' office number
        - Encourage them to save to their contacts
    - Highlight pertinent policies
        - Leave Policy and Procedure/FMLA
        - Dress Code
    - Date when training starts
    - Give NWN Agent Training Manual
    - Complete Form 6505 – EES Designated Agent Confidentiality Agreement (for EES Test)
    - Requesting time off
    - Do you have any time off that was scheduled prior to you accepting this job?
        - We want to accommodate you (especially paid trips, etc.)
- [ ] Reminder email to supervisors – Add new hire name to email distribution list